

CHAPTER: IV APPLICATION	SECTION: 4 INTERVIEW- ROLE OF CASE MANAGER	COMAR: 07.03.03.04
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REQUIREMENTS

- A. Always focus the interview on the goals of the Family Investment Program:
 1. TCA is the last resort
 2. Independence through work for most families
 3. Achieving independence as soon as possible
 4. Meeting the needs of the family as they work toward independence
- B. The interview format varies in each local department, but basically includes these components:
 1. Assessment of the family's needs
 2. Exploration of personal, family, and community resources which may be available to meet the need
 - Includes potential income sources, such as SSI, Unemployment Insurance, Veteran's benefits, etc.
 3. An offer, if deemed appropriate, of benefits in lieu of TCA, such as a Welfare Avoidance Grant (WAG)
 4. An offer of supportive services, such as:
 - Child support services
 - Job services
 - Food stamps
 - Medical Assistance
 - Child care
 - Transportation
 - Referrals to other program services, such as, Families Now, Legal Services, etc.

CHAPTER: IV APPLICATION	SECTION: 4 INTERVIEW- ROLE OF CASE MANAGER	COMAR: 07.03.03.04
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C. When other resources will not meet the family's needs, the interview also includes:

1. Oral and written information about:
 - The requirements of TCA
 - An explanation of forms and why signatures are needed
 - The applicant's right to:
 - a. Appeal any action
 - b. A written notice explaining the benefit and/or reason for any action
 - c. Equal rights to services (non-discrimination)
 - d. Claim good cause for not complying with certain requirements
 - The applicant's responsibility to:
 - a. Provide true and complete information
 - b. Report changes
 - c. Use MA cards properly
 - d. Cooperate with Quality Control
 - Fraud and the penalties for fraud
 - Substance abuse screening and treatment requirements
2. Signing a mutually agreed upon agreement which outlines:
 - The applicant's requirement to comply with requests to cooperate
 - Work activities and steps to achieving independence in which the individual will participate
 - Other actions the individual is required to take, including the obligation to apply for potential income
 - The services which the local department will supply to support the path to independence

Note: The agreement will be modified as customers make progress toward independence or as barriers develop.

CHAPTER: IV APPLICATION	SECTION: 4 INTERVIEW- ROLE OF CASE MANAGER	COMAR: 07.03.03.04
-----------------------------------	--	------------------------------

INTERVIEW – BASIC AREAS

- A. The case manager explores 5 basic areas in order to assess the family's needs, resources, and strengths
1. Who are you?
 - What is the family composition for various programs?
 - What are your social security numbers for each family member?
 - How old are the children? Is a child under 1-year old?
 - To what degree is childcare needed?
 - Are absent parents available to help?
 2. Where do you live?
 - What is the actual address?
 - What are the living arrangements?
 - Can someone in the home provide childcare?
 - Is there moral support from family or friends?
 - Can a community resource help over the short period?
 3. What is your family's income?
 - What is the current income?
 - Are there any disabilities?
 - What are the employment plans?
 - Is substance abuse a problem?
 - What is the work history?
 - What are any other sources of income?
 - How many resources will the family need to become employed?
 4. What are your family's assets?
 - Are there any funds for a "cushion"?
 - Is transportation available to jobs or training?

CHAPTER: IV APPLICATION	SECTION: 4 INTERVIEW- ROLE OF CASE MANAGER	COMAR: 07.03.03.04
-----------------------------------	--	------------------------------

5. What does your family need?
 - What alternatives to cash assistance are available?
 - Can a WAG keep the applicant independent?
 - Will childcare, Food Stamps, and Medical Assistance be enough?
 - Is there the potential for child support?
 - Are childcare services or other resources needed to perform an up-front job search?
- B. At the end of the interview, the case manager knows:
 1. Who is in the family
 2. What personal, family resources or potential resources are available to support independence
 3. The history of independence of the family and how to build on it
 4. What resources the local department needs to offer
- C. Each local department may have interview guides that incorporate all the basic areas

ROLE OF THE CASE MANAGER

- A. The case manager is the customer's link to the local department and other services, and as such:
 1. Represents the agency
 2. Is the first contact with the local department
 3. Creates an atmosphere of trust where the applicant can relate in a productive manner
 4. Focuses on the strengths of the family

CHAPTER: IV APPLICATION	SECTION: 4 INTERVIEW- ROLE OF CASE MANAGER	COMAR: 07.03.03.04
-----------------------------------	--	------------------------------

- B. The case manager assists customers to:
1. Identify their strengths and needs
 2. Identify resources or potential resources to maintain or achieve independence
 3. Assume responsibility for their own lives
 4. Plan, solve problems, and make decisions
 5. Develop a successful plan of action
 6. Define outcome expectations
- C. The case manager needs to be a positive role model by being:
1. Sensitive to applicants and customers
 2. Respectful of differences in every individual
 3. Flexible
 4. Courteous
 5. Appropriately dressed
 6. Positive and maintaining a good attitude
 7. Able to communicate so that customers understand the expectations
- D. The case manager must assume many roles to meet the needs of the customer:
1. Facilitating steps to independence
 - Job developer
 - Advocate
 - Public relations person
 - Mediator
 - Negotiator
 - Diplomat
 - Investment counselor
 - Resource person
 - Service provider

CHAPTER: IV APPLICATION	SECTION: 4 INTERVIEW- ROLE OF CASE MANAGER	COMAR: 07.03.03.04
-----------------------------------	--	------------------------------

2. Supporting and encouraging the customer
 - Coach
 - Cheerleader
 - Counselor
 - Motivator
 - Advisor
 3. Determining eligibility for cash or services
 - Teacher/Learner
 - Investigator
 - Listener
 - Problem Solver
 4. Ensuring compliance with the program requirements
 - Monitor
 - Enforcer
- E. The scope of the job may vary from one local department to another, but:
1. Every case manager uses all the roles to some degree
 2. The roles overlap with the various job functions

CHAPTER: IV APPLICATION	SECTION: 4 INTERVIEW- ROLE OF CASE MANAGER	COMAR: 07.03.03.04
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EXAMPLES

Example 1. Wendy Worker, case manager, has been very successful in helping her customers achieve independence. When new case managers shadowed her, they found that she:

- Conducted herself professionally, treating each customer with respect and dignity
- Listened intently to each customer, acknowledged concerns and problems, but focused on the positives and strengths
- Helped the customer plan and problem solve, but did not take over the responsibility for the plan or the problem
- Maintained a positive attitude, always looking for options and solutions

Example 2. Martha Manager, case manager, seemed to have similar families, but was not so successful in helping her families achieve independence. Her supervisor observed and found that she:

- Never deviated from her interview format, generally did not respond to questions
- Treated everyone exactly the same, not acknowledging individual differences
- Did not show a positive attitude

Example 3. Hannah Helpful, case manager, is very popular with her customers, but has not been successful in helping her families achieve independence. Her supervisor observes that she:

- Is friendly, pleasant, and courteous, but does not keep a professional distance and gets overly involved with each family
- Spends a lot of time trying to figure out what can be done to solve problems without customer input
- Takes the lead in developing the independence plan

ADDITIONAL INFORMATION

- Application – Assessment
- Application – Agreement
- Application - Process